✅ RebootIT.cloud Strategic MSP Transformation Checklist

Use this to guide your journey from break-fix to strategic partner:

☐ 1. Self-Assessment & Awareness

Map out your services, revenue streams, and client types.
Have you documented what you offer, how it's delivered, and where your revenue comes from?

☐ 2. Leadership Alignment

Ensure your leadership team is unified around a shared vision.
Have you held a meeting to clarify strategy, roles, and goals?

☐ 3. Financial Cleanup

Eliminate unprofitable projects and services.
Have you audited what's draining your margins and simplified billing models?

☐ 4. Stack Simplification

Too many tools = too much noise.
Have you reviewed your stack to remove redundant tools and standardize platforms?

☐ 5. Package & Price Strategically

Move away from hourly billing.
Have you created 2–3 outcome-based service bundles your clients can understand?

☐ 6. Launch Customer Success

Start building long-term relationships.
Have you appointed someone to lead QBRs and track client success goals?

☐ 7. Optimize the Client Experience

Improve onboarding and support workflows.
Have you mapped the client journey and improved at least one key touchpoint?

☐ 8. Build Strategic Relationships

Tap into your ecosystem.
Have you met with your distributor, vendors, or peer community to find growth programs?

☐ 9. Introduce AI & Automation

Start small, scale intentionally.
Have you piloted AI in one area (ticket triage, documentation, reporting)?

☐ 10. Elevate, Expand, or Exit

Decide your next chapter.
Have you defined what success looks like — growth, legacy, or exit — and built a 90-day plan?

🔗 Need help?

Call Jason @ RebootIT.cloud

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